

maintains direct communication with his three Task Leaders in the conduct of daily operations. Additional responsibilities of Mr. Alpert include providing technical oversight for all task activities, monitoring task progress, performing personnel functions such as hiring, terminating, recruiting and encouraging personnel development, as well as implementing continuous quality improvement activities throughout all phases of task work. For the Golden Field Office, this will be conducted on an ongoing basis from initial contract start-up. He will conduct weekly staff meetings with Task Leaders and task teams to discuss the status of all activities, receive progress reports on issues and assignments, and have ongoing meetings with the Golden Contract Officers Representative to discuss the status of the daily operations.

2.4.2 Responsibilities of the Task Leaders

The Task Leaders are directly responsible for implementing and managing the activities in their individual task area. They provide direct technical expertise, technical contributions, and supervisory authority over the day-to-day activities of the contract. Each Task Leader is a seasoned professional who is completely capable of interacting with the Golden Field Office personnel and generally operates, with discretion, under the guidance of the Project Manager. They are accountable to the Project Manager for meeting established technical, cost, labor, and contract management expectations.

Specifically related to the Statement of Work, each of the Task Leaders are responsible for managing all activities for their particular task team. For example, in addition to his responsibilities as project manager, Mr. Alpert will act as the Task Leader for the Office of the Manager and Laboratory Operations. In this capacity he will directly manage all support services of public affairs and paralegal, as well as identify and secure appropriate capabilities from the IRT Resource Pool to assist the Office of Laboratory Operations as needed.

Mr. Vernon Archer, the Task Leader for Management, Administration, Acquisition, and Financial Assistance, will be responsible for oversight of activities of the clerical staff, including the front desk receptionist, all mail management activities, and personnel support for Golden, which includes staffing, recruiting, and maintaining the Corporate Human Resource Information System (CHRIS). In addition, Mr. Archer will oversee the financial and acquisition support services, including document preparation, tracking, and reporting. Mr. Archer will ensure that clear lines of distinction are maintained in his team's accountabilities to each office.

Mr. Samuel McClung, the Task Leader for the Office of Computer Operations has responsibilities that span the entire Golden Field Office. The computer operations/network management and software/database support areas are cross-cutting, infrastructural functions that require specialized expertise and responsibilities. Mr. McClung will be responsible for managing and implementing the Golden computer operations functions, and will have a team of experts in this area to provide the daily support for troubleshooting computer issues, answering help desk calls, maintaining databases, hardware and software requests and problems, and implementing all LAN administration activities.

Ms. Roxane Drayton, the Task Leader for the Office of Project Management, will be responsible for overseeing and implementing the various project management activities for Golden. Ms. Drayton will work with her team members to provide technical services in managing projects that promote the use of energy efficient technologies, and will do that through managing the Golden solicitation process by assisting project managers with the development of the solicitation and the evaluation and award process. Ms. Drayton will also work with her team on the monitoring and evaluation of different projects that are the result of the solicitation.

2.4.3 Overall Task Management Responsibilities

The Project Manager and Task Leaders must have task management processes and procedures in place in order to effectively accomplish their responsibilities associated with the Statement of Work requirements. To meet the Golden Field Office requirements, we will implement our tested and proven task management procedures, which include: Task Planning, Monitoring and Scheduling; Cost and Labor Controls; and Quality Assurance. These processes and procedures will ensure that all SOW requirements are met and managed effectively.

2.4.3 Task Planning, Scheduling, Monitoring and Cost Controls

As highlighted in Exhibit 2-2, the IRT task management process is used to deliver accurate, timely, and effective results to our clients. This time-tested DOE task order process, including technical reviews, continuous improvement approaches, internal and external communications, and project controls, has been utilized and proven in the delivery of products and services to our DOE and other government clients.

Task Planning and Scheduling

Effective task management begins with careful planning and oversight. IRT believes that by explicitly articulating and laying out the task at the outset, all players will have a clear idea of what needs to be accomplished, by whom, and with what resources. The process begins when the Project Manager receives a task order from the Golden Field Office. The Project Manager and Task Leaders will work together with the Contracting Officers Representative to define work requirements and schedules, highlighting the individuals to perform the task and the associated cost breakdown and hours for the particular task. This will provide a baseline project work schedule against which progress can be readily measured at any time over the course of the project.

The Project Manager and Task Leaders will approach task scheduling for Golden along two dimensions. First, within each task, activities will be properly sequenced to provide critical decision making information necessary for proceeding to the next step. This will enable the most efficient scheduling of resources and completion of the highest quality service/product at the

Exhibit 2-2
IRT Task Management Process

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earliest possible time. Second, competing priorities among rapid-response tasks and long-term assignments will be anticipated and considered to ensure that all immediate deliverable requirements are met without sacrificing the quality and timely completion of longer term assignments.

Task Monitoring

Once work begins under a task, each assignment will be carefully monitored to track its progress. Task leaders will be responsible for maintaining an activities log that will be submitted to the Project Manager on a weekly basis.

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Each Task Leader will conduct weekly meetings to assess progress of all activities and adjust personnel assignments as necessary.

Cost Controls

IRT has proven cost and labor management mechanisms in place to provide information on demand to our project management team throughout the task management process. These procedures are structured within a process for task execution prescribed by DOE and other government clients.

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2.4.4 Quality Assurance Responsibilities

Quality assurance (QA) is a visible component of our corporate culture. Implementing quality responses is a shared responsibility throughout the organization. We place emphasis on training, consistency in approach, continuous process improvement, performance monitoring, and a total commitment to customer satisfaction. We will incorporate QA techniques into all aspects of our relationship with Golden, including one-on-one meetings, project performance reviews, contract management, personnel standards, incentives for performance, and evaluation. While the Project Manager maintains overall responsibility for product quality, each member of the IRT Team is responsible for providing Golden with the highest quality products and services.

The IRT Team's quality management approach ensures maximum return on efforts in the form of improved product output, schedule and cost performance for our customers. Quality Assurance is designed to meet the unique needs of the support services work environment. We focus on improving how we respond to day-to-day requests. Fostering QA and organizational excellence in support services is a multifaceted approach. Our approach to quality assurance includes:

Quality Planning: We work with the client to reach a thorough understanding of the task purpose and develop an outline, vision, and specifications for the required service.

Personnel Evaluation and Assignment: The Project Manager selects the individuals with the most relevant knowledge and experience to perform the assignment.

Detailed Resource Assessment: In conjunction with the Golden Contracting Officers Representative, IRT will work to ensure adequate costs and first rate, effective resources are made available to all employees for task completion (this may include any specialized or refresher training that IRT will provide to the staff).

Encouragement of Critical Thinking: The Project Manager ensures that all personnel assigned to a project have the necessary understanding, principles, and management guidance to complete the project proactively and completely.

Rigorous Performance Review: Task Leaders conduct on-going accuracy reviews to ensure standards of performance are met or exceeded for the activity. For product related requirements, an editorial review, which includes copy editing and proofreading, is included in the process.

Recognizing and Rewarding Quality Work: IRT has well ingrained recognition programs, which include financial rewards to staff throughout the year for taking initiative and delivering high quality services to our clients.

Customer Feedback: Quality assurance starts and ends with communication between the Team and the client – we seek it, we listen, and we respond to it. All feedback improves our effectiveness.

Customer satisfaction is key to our corporate philosophy, and is key to our management/organizational structure.

PROJECT MANAGER

Introduction

This section outlines the exceptional professional capabilities and background of the IRT Project Manager, Mr. Thomas J. Alpert. It also describes his responsibilities and authority in carrying out the tasks required by the Golden Field Office. Mr. Alpert's resume is detailed in Section 2.0. This section presents a comprehensive summary of Mr. Alpert's abilities and the corporate support available to the Project Manager and his colleagues.

Project Manager Capabilities

Mr. Thomas J. Alpert has more than 15 years experience as a leader on Federal Government projects. His background includes program and technical management, and leadership of a broad range of projects, including advanced electronics, energy generation and transmission, and property management. In addition to project management, Mr. Alpert has conducted environmental impact assessments, designed computer software and hardware, and has been a presenter at several public speaking engagements. Mr. Alpert's combination of technical, analytical, and personnel management skills enables him to manage a diverse work force and project load.

Mr. Alpert has comprehensive experience with Federal clients, including the Western Area Power Administration (WAPA), the Air Force Satellite Control Network, and the Air Force Space Command. While in these positions, he managed projects and personnel at several locations, coordinating the activities of a diverse, and geographically separated group of individuals.

Mr. Alpert has extensive personnel supervisory skills. For WAPA, he managed a staff of 50, which included clerical, administrative, engineering, finance, and information technology positions at three different geographic locations. Support provided for WAPA included computer operations, clerical support, records management, receptionist duties, mail room operation, and personnel and finance functions. He directed and performed program personnel functions including staffing, performance and salary reviews, and personnel development. Mr. Alpert conducted annual reviews of project leaders, which included personal interviews, detailed reports, and salary increase justifications. He also supervised and tracked employee training and has conducted team-building exercises to ensure a cohesive, productive work force. This close attention to detail and hands-on approach to personnel management enabled Mr. Alpert to stay abreast of employee issues and developing problems, therefore aiding him in the assessment and resolution of workforce difficulties.

For the M.I.T. Lincoln Laboratory, Mr. Alpert provided supervision for staff members and monitored more than 100 high technology research programs. For the Sacramento Air Logistics

Center, Mr. Alpert developed workload schedules and monitored daily work efforts of personnel to ensure compliance with task order requirements.

Mr. Alpert also has a firm grounding in financial management, budgeting, and cost control. For the Sacramento Air Logistics Center, Mr. Alpert maintained continuous and effective financial functions of budgeting, purchasing, travel, payment approval, invoicing, and receivables control. He also prepared draft task orders and task order management plans. For the Center, he prepared status reports, attended meetings, reviewed and approved technical deliverables, and served as the primary technical interface with the customer.

Mr. Alpert's experience includes the monitoring of processes to report and control progress relative to established contract cost, schedule, and quality standards. For the Western Area Power Administration, he maintained continuous and effective controls of the contract budget, purchasing, travel, payment approval, and invoicing.

For both Hanscom Air Force Base (MA) and the Air Force Space Command, Mr. Alpert prepared monthly cost analysis reports, authored technical tasking statements, and technically reviewed all contract modifications. He also provided daily monitoring of task order proposals, and supervised financial support services and procurement support.

Mr. Alpert's professional background includes extensive project managing and monitoring. For WAPA, Mr. Alpert's responsibilities included technical oversight and monitoring of processes for continuous improvement. While at the Air Force Space Command, Mr. Alpert prepared status reports, reviewed and revised program documents, and developed and updated briefings for various program requirements on operational, system, and technical issues. He also reviewed, revised, and updated existing program-specific documents, such as engineering change proposals and specification change notices.

Earning his Bachelor of Science degree in Physics, Mr. Alpert continued his education and earned a Masters of Science degree in Engineering Physics. He has pursued additional schooling through the U.S. Air Force Air Command and Staff College, and the U.S. Air Force Air War College.

3.3 Responsibility and Authority of the Project Manager

The Project Manager is vested with the professional responsibility of ensuring project success, and has all the authorities necessary to successfully exercise this responsibility. Exhibit 3-1 describes the responsibilities of an IRT Project Manager. Utilizing the task planning, scheduling, monitoring, and cost controls described in Section 2.4.3, Mr. Thomas Alpert will have complete authority to interact with and make all project-related commitments to the Contracting Officer's Representative; to secure and manage all necessary technical, project, and administrative staff; to develop, modify, and execute all technical, cost, and contract management control functions; to negotiate, execute, and when needed, terminate tasks with the IRT subcontractor; to ensure

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Mr. Alpert will be empowered with complete flexibility to respond to new and changing project requirements, including shifting priorities, the redirection of efforts, program adjustments, schedule modifications, and level-of-effort fluctuations. IRT's proven project management approach ensures that the Project Manager has the resources and discretionary authorities needed to meet all project challenges decisively so that client objectives and expectations are satisfied immediately.

The IRT Project Management Plan also addresses the unlikely possibility that the Project Manager needs to obtain decisions beyond his authority for resolving priority conflicts for resources not under his direct control. As Project Manager, Mr. Alpert will report directly to Ms. Faye Fields, President of IRT. In the event of priority conflicts for resources, Ms. Fields will first investigate the possibility of internal scheduling adjustments that are transparent to all clients to ensure that all deadlines are met effectively. Second, Ms. Fields will identify and secure any additional resources needed to complete all client requirements. As mentor to IRT, McNeil Technologies will make available to IRT all resources at its disposal to meet these project requirements. In turn, Golden will benefit from a much larger resource base than would normally be available from an organization meeting the \$5 million small business size standard.

3.4 Corporate Support and Commitment

IRT is uniquely situated to offer unequalled support and commitment to this project.

It offers the benefit of a mentor-protege relationship with a teaming partner that has years of experience building a reputation for excellence within the EERE operating environment.

The Team offers the dedicated involvement of two corporate Presidents to ensure this project starts and is maintained with the highest technical and financial standards.

IRT offers extensive technical and administrative resources available at both our Denver and Headquarters offices to meet specialized non-recurring requirements.

Our Team's corporate relationship is founded on support and cooperation, not on competition.

We offer a unified cost reporting structure that will ensure consistency and accuracy in the fulfillment of all reporting requirements.

IRT has numerous personnel, facilities, equipment and corporate infrastructure assets available to assist the Project Manager in executing his responsibilities. First, IRT maintains a Denver office located one mile from the Golden Field Office. This facility has fully equipped offices and three conference rooms capable of accommodating meetings of four to 20 people that are available to assist the Project Manager in meeting requirements off-client-site.

In addition, the IRT Team has an extended resource pool of more than 34 technical experts that have years of experience in conducting efficiency studies, statistical analyses, surveys, and engineering and environmental studies listed in the Non-recurring Functions section of the Statement of Work. These individuals are located in both Denver and Springfield, Virginia, 15 miles south of the Department of Energy's Forrestal Building, and are available along with a full accompaniment of analytical tools as requirements arise. In addition, the IRT Team's Springfield facility has a conference room for offsite meetings, equipped with overhead projector and conferencing phones, as well as extensive computer hardware and software resources that are available immediately for utilization on this project.

4.0 STAFFING

4.1 Introduction

IRT understands that effective project staffing is contingent upon assembling the right mix of skills, experience, and motivational drivers. It requires an investment in corporate time and resources to recruit, develop, and motivate highly qualified staff. IRT is also convinced that this is the only approach to building a strong business relationship with our clients and to keep those clients satisfied by providing solid performance and quality products. IRT's operating philosophy and personnel management procedures specifically match the professional services and client-responsive environment of our business practices.

To demonstrate the benefits of our approach to staffing, we will first present our understanding of the staffing requirements. We will then set forth our approach to developing an exceptionally skilled, highly motivated team of personnel to address Golden's support requirements, systematically reinforced by ongoing training and the recruitment of new skills and capabilities as they become necessary.

4.2 Understanding of the Staffing Requirements

Assembling the proper personnel to meet the support requirements of the Golden Field Office first requires a comprehensive understanding of both Golden's operating environment as well as the technical, administrative, and interpersonal skills dictated by the Statement of Work. It also requires a clear understanding of how support personnel resources are best allocated across the project organization, such as depicted in Exhibit 2-1, in Section 2.2.

First, because of the diversity of technical and administrative expertise required, the project leadership must have at the outset the rare combination of experience and technical expertise to effectively recruit and manage. For example, the expertise and experience needed to manage computer operations differs dramatically from that of managing data entry clerks, mail room assistants, or public affairs specialists. The management team must be able to function as the integrator that, through careful recruitment and selection, builds the "Team" to support Golden.

Second, the functional requirements contained in the Statement of Work must be addressed by seasoned personnel capable of responding to unforeseen circumstances and fluctuations in workload with the proper skills and attitude. For example, to respond effectively when an unexpected delegation appears at the door, the receptionist must not only be well versed in the telecommunications system, the Golden organization, and personnel, but also its relationships with NREL, the ROs, Headquarters program offices, and private sector stakeholders. Only then can the Golden program management have confidence that the proper hospitality and responsiveness will be forthcoming.

Third, support for all requirements must be performed effectively and without interruption through appropriate cross-training, especially those noted to be "Critical." But the criticality of a function is often the result of extenuating circumstances, such as processing funding disbursements from headquarters, the delay of which might result in untimely project interruptions. While some requirements are by nature more forgiving than others, cultivating a workforce that takes possession of its total responsibilities, along with the proper development of skills and training, can provide assurance that all requirements can be met without disruption.

Fourth, personnel policies are required that support the development of employee potential within the organization, thereby maximizing the contribution of personnel at all project levels. Too often support contractor employees at government sites are vulnerable to feelings of isolation and a sense of corporate indifference to their situations and their contributions to the client's well-being. Incentives and recognition must be available and used to enhance morale and improve employee motivation, initiative, and retention. Only through such personnel policies and practices can employees begin viewing themselves as members of the "Team."

IRT's approach to meeting these staffing requirements is founded on years of experience of providing administrative and technical support to EERE Offices. The approach outlined below is well integrated with our Transition Management approach and evolves from and supports our corporate personnel policies and practices.

4.3 Staff Development

In approaching these requirements, IRT's first step has been to establish a management team with exceptional qualifications to initiate staff recruitment, selection, and training on day one of contract award. Mr. Thomas Alpert, the proposed Project Manager, has staffed and managed comparably complex efforts of 50 personnel at three different locations providing support for computer operations, network management, software and data communications equipment, clerical support functions, records management, receptionist, mail, fax, and filing support, financial support services and procurement support. He is uniquely qualified to review personnel credentials and identify critical skills, qualifications and attributes for support across the entire project. Mr. Samuel McClung, Task Leader for Computer Operations, is experienced in the installation, maintenance and troubleshooting of LAN/WAN equipment, various quality control test equipment, and ISDN, T1 and T3 installation, maintenance, and troubleshooting. He is experienced with all equipment, systems software and COTS applications software which comprises the Golden computer environment. He has extensive technical experience and experience managing computer personnel. Mr. Vernon Archer, Task Leader for Management, Administration, Acquisition, and Finance has managed administrative staff functions on-site for the EERE Office of Management and Operations. He is extensively familiar with the EERE organization and its operating environment, and has designed an action tracking system that is in use and under evaluation by several ROs. Ms. Roxanne Drayton, Task Leader for Project Management, has provided program management support for the Federal Energy Management Program and other Federal clients, and is expert in energy engineering and economic analysis.

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Workload Management

IRT expects its Project Management Team to effectively manage multiple tasks with varying schedules and workloads. Thus, an additional component of our approach is the continuous monitoring of workload volume and performance. IRT Task Leaders are responsible for maintaining activities logs that are submitted to the Project Manager on a weekly basis. The logs detail activity levels, key tasks and milestones, support team members, staff performance, and any additional comments needed to keep the Project Manager abreast of current contract performance. This ensures that the Golden workload is managed effectively, seamlessly, and in such a way that the capabilities of supporting staff are engaged appropriately. This approach has the additional benefit of alerting the Project Manager to potential fluctuations in workload, personnel staffing needs, and the workload of all employees. Problems are addressed on a timely basis without interrupting the larger flow of work and project priorities.

Building the Team

The working atmosphere at IRT is built upon a sense of individual responsibility. Employees are encouraged to be creative as they perform their assigned tasks. While managers closely monitor the progress and quality of work being performed, there is no "looking over the shoulder" of employees. The ability to work effectively on one's own initiative, and as part of a team are essential. IRT has an open-door management policy; employees are encouraged to communicate freely with their supervisors. Such a policy assures us that managers are keenly aware of issues or concerns throughout the staff.

Organizing as a Team

The IRT Team has a successful history of delivering and maintaining a motivated and stable staff. We believe that satisfied and motivated employees lead to satisfied and successful clients. Our investment in retaining highly qualified individuals is driven by our commitment to build a strong business relationship with our clients and to retain those clients by providing solid performance and quality products. IRT's operating philosophy and personnel management procedures specifically match the professional services and client-responsive environment of our business practices. As mentioned earlier, policies that encourage personal development, skills enhancement, and assumption of increasing responsibility provide every employee the opportunity for growth and reward. These policies build a dedicated staff that is sensitive to client needs and provides the highest quality service.

Nevertheless, more is needed to provide excellent support services than just superior staff. These staff must be organized and managed to promote quality service. IRT's strategies in this area are described below.

4.4 Cross-Training

A highly qualified collection of individuals must be organized and managed to establish a versatile, flexible team. Staff members will be cross-trained to competently perform functions and responsibilities in addition to their own job responsibilities. Such cross-training establishes an environment in which the staff are aware of their "back-up" colleagues, and who they may turn to for additional support. This promotes a "can do" approach to meeting customer needs, and encourages staff to provide higher levels of customer satisfaction.

The cataloguing of staff skills during the initial phases of the Golden staff development process will be particularly useful in identifying appropriate matches for cross-training and back-up. Individuals with similar skill sets involved in different functions within the same task team would be the first priority for cross-training, since redeployment of personnel within a single task area can be readily executed by the Task Leader in the context of internal work fluctuations. Also, as part of the cross-training process, the Task Leader can detail the back-up to work in the critical capacity on a routine basis, as in the instance of receptionist, to ensure that skills and

training remain fresh. However, instances could arise when back up from within the same Task Team would not be practical. In those instances, short-term reassignments of personnel across task teams would be necessary.

In IRT's approach, for each position there will be two to three additional personnel trained to perform the specific job function.

Task Leader will develop a curriculum and three-ring binder of reference materials incorporating all necessary information. For instance, for a position such as the Receptionist, the reference manual would describe the technical operation of the telephone system, established response procedures, personnel and organizational information, and standardized responses to unfamiliar inquiries ("I'm not sure who handles that information, but if you will give me your name and telephone number, I would be glad to find out and call you back"). Further, being selected for cross-training should be approached by management with recognition and reward. Under the IRT personnel policies, cross-trained individuals would be excellent candidates for "Lightning Bolt" awards, described below, through which they can be honored and receive cash awards for their commitment to project success. This process, if executed properly, can enhance employees' sense of value by knowing they can perform multiple functions, rather than being locked into a single avenue for professional growth and development. Thus, while setting a higher standard of performance, IRT's cross-training approach also ensures that highly competent and trained staff members are readily available to meet unexpected workload fluctuations, and provides employees with the security of knowing they are valued team players.

4.5 Staff Retention and Replacement

As employees prove themselves capable, they receive more duties and responsibilities. To reward people for their quality service and to build corporate staff sources over time, IRT has a highly successful policy of developing and promoting employees from within. In addition, IRT utilizes an Annual Exemplary Performance Award (AEPA) program to reward senior employees for superior performance. The AEPA recognizes new skill development and extra effort toward client satisfaction as worthy of financial reward. We recognize outstanding achievements made by junior employees and support staff throughout the year with "Lightening Bolts," cash awards made on the spot for exceptional performance. It is understood that a job at IRT has career advancement potential. These attributes of individual responsibility and corporate support for growth enable IRT to maintain an employee morale atmosphere that prompts employees at all levels to go the extra mile.

Task Leaders are responsible for resolving any minor disciplinary problem that may arise on a day-to-day basis. IRT's policy for handling a problem is to discuss it first with the staff member. If the problem is not corrected, a probation period is provided during which the employee can rectify the situation. If the problem persists, the staff member is counseled by the Project Manager to determine whether a job transfer is in order, or whether problems unrelated to the job are affecting employee performance. If placement in a new position is unfeasible and ongoing consultation fails to produce desired improvements, the employee may be terminated. Major

infractions are the responsibility of the Project Manager. The Project Manager may, at his option, elect consultation, a transfer, or immediate termination. Examples of major infractions include illegal actions, inappropriate behavior toward clients or other employees, and/or consistently poor job performance.

4.6 Staff Recruitment

When a position is opened for recruitment, several steps are taken by our Human Resources Department to obtain highly qualified candidates, and include the following:

Advertisements are placed in local newspapers;

Notice of job opportunities within the company are posted for access to growth opportunities and/or job promotions;

Job descriptions are posted on the Web;

All employees are requested to refer candidates with the requisite skills for employment;

IRT notifies and seeks referrals from women's, minority, handicapped, and veteran's organizations;

A professional recruiter is on staff who is proficient in scanning numerous personnel and job placement networks to identify potential candidates and quickly evaluate their qualifications.

A summer intern program is operated for college students – several junior level positions have been filled with our interns after they have completed their education.

In summary, IRT offers a culture of respect for the individual, and has a management staff who deliver not only to Golden, but to their own employees. We provide a stimulating environment where people are respected and given opportunities to grow within the scope of the contract and within our company.

5.0. TRANSITION PLAN

This Transition Plan is based on IRT's actual contract transition experience and ensures a smooth transition, maintaining continuity of services. The Transition Plan is a comprehensive, effective, and nondisruptive approach and is the cornerstone for ensuring future performance excellence and establishing a lasting, productive, contractual relationship.

The functions of the On-Site Support Services contract are directed toward the support of the critical operations of Golden and Seattle. Support cannot be interrupted; therefore, there must be a collaborative and cooperative transition effort between the existing contractor, the successor contractor, and Golden to ensure continuity of services. Since IRT intends to offer positions to most of the incumbent personnel (subject to a personnel review with Golden Senior Management), the transition will be less complex. However, the normal reaction to change demands a phase-in plan to ensure Golden that a successful hand-over will be accomplished. We also will assure employees that the continuance of their services is desired, and they will receive equal or better benefits.

Therefore, high morale of the incumbent workforce is a key element of the transition period. Not only must employees feel confident their jobs are not going to be offered to outsiders, but they must know they are valued members of the IRT Team. We will quickly develop a sense of employee pride and ownership through our orientation and communication program. We will demonstrate our honesty, integrity, and professionalism in everything we do with the incumbent workforce.

Furthermore, we recognize Golden has a legacy of success. We will not make changes for change sake. Systems and procedures that are effectively working will be continued. Proposed changes of value to management and mission accomplishment will be thoroughly discussed with Golden before serious efforts are made to bring about their implementation.

We want Golden to be confident and comfortable with our assumption of responsibilities on this contract, and confident we are organized with the people, the schedule, and the dedication to implement a seamless transition. The most important step towards forming a lasting contractual relationship is to deliver an effective non-disruptive transition – a pledge IRT makes to Golden.

5.1 Plan Objectives

IRT's objective is to complete a comprehensive 30-day transition with no adverse impact to ongoing operations. Accomplishing our objective will have us prepared, upon contract start, to assume all functional responsibilities managed by a fully oriented, hands-on management team. The transfer of contract responsibility and daily operations from the existing contractor to IRT is designed to be transparent to Golden and Seattle operations. This smooth and comfortable transition will be accomplished by:

- Gaining a hands-on understanding of all aspects of the contract;
Orienting the incumbent workforce as part of the IRT Team;
Completing as many pre-transition activities as possible prior to contract start-up; and
Controlling execution of a plan and schedule focused on key issues.

Master Transition Plan

The IRT Transition Plan details the tasks to be accomplished, major milestones, and schedules. The overall plan and schedule is illustrated in Exhibit 5-1. A discussion of the activities associated with our plan is below. All members of the IRT Transition Team will be stationed in Golden (at the IRT Regional Office) to conduct transition activities. A transition visit will also be conducted in Seattle to ensure the client and contractor workforce are in place and that client satisfaction is achieved for the Seattle Organization.

Transition Team Organization

The success of any project is built on the capability and credibility of the personnel assigned to the effort. IRT proposes a Transition Team that offers a unique and talented cadre of specialists with specific areas of start-up responsibility. The Team will base its transition operations out of our offices in Golden, Colorado. Key members of the Transition Team are:

Ms. Faye Fields, President, IRT, a specialist in human resource/personnel issues;

Ms. Mariana Uhrlaub, Senior IRT Consultant, a specialist who has extensive knowledge and familiarity with Golden operations;

Mr. Thomas Albert, IRT Project Manager, an individual who has demonstrated the capability to manage and staff on-site support service contracts;

Mr. Ronald Thomas, President, McNeil Technologies, Inc., a corporate manager who has directed the start-up and successful implementation of EERE support contracts for more than 15 years; and

Mr. George Washington, IRT/McNeil Senior Recruiter, a proven recruiter with the ability to staff broad-based assignments in time-sensitive environments.

During the early stage of transition, the IRT President and Project Manager will meet with Seattle representatives and will also initiate transition steps to ensure full support is provided to Seattle.

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The strengths of our team are evident in the assignments that each member will perform. Their assignment areas are as follows:

Transition Team	Personnel	Process and Operations
Faye Fields (lead)	✓	
Ronald Thomas (lead)		✓
Mariana Uhrlaub	✓	✓
Thomas Albert	✓	✓
George Washington	✓	

5.2.2 Personnel Phase-In

IRT recognizes that staffing and personnel issues are key to the success of this project. Ms. Faye Fields, President of IRT, will lead the Personnel Team supported by our Senior Consultant, Ms. Mariana Uhrlaub, and a Senior Personnel Recruitment Specialist, Mr. George Washington. The primary focus of this effort will be to ensure that morale is maintained and strengthened for the workforce, and to seek maximum retention of qualified members of the existing workforce.

The existing contractor has Contract Clause I.3 - Continuity of Services, as part of their contract with Golden. This clause directs the contractor to provide field cooperation with Golden and the new contractor to effect a smooth transition. Based upon the Golden CO's notice, this will enable IRT to conduct on-site interviews (if necessary, interviews can be conducted at IRT's Golden office); review personnel records; make offers to qualified personnel; and negotiate transfer of applicable fringe benefits. Additionally, this will enable IRT staff to personally explain our excellent benefits program; discuss staff training interests and plans to ensure that individual training/education interests are implemented and are consistent with project activities/skill needs; demonstrate the positive management interaction/awareness/ involvement that is critical to enhancing morale; and promote the positive, can-do attitude that our Team brings to DOE Golden and to the new members of the IRT staff. A similar process will occur with the Seattle office.

In some cases, there may be positions that need to be filled or staff whose performance does not warrant retention. For these reasons, our senior recruiter will be actively involved in identifying and interviewing candidates to fully staff the project. The benefits of having an experienced individual focus on this part of the transition include rapid identification of qualified candidates, and the ability to commit to fully staff operations on or before the conclusion of the 30 day transition.

5.2.3 Process and Operations Phase-In

IRT strongly believes that a seamless transition requires an understanding of what operational aspects work for Golden and what types of processes/functions Golden may want to see changed. This part of the Transition Team will be lead by a corporate manager, Mr. Ronald Thomas. He is an experienced EERE support services Project Manager. Mr. Thomas will be supported by Ms. Mariana Uhrlaub and Mr. Thomas Albert. Their activities will include review of on-site operating policies and procedures; current status of workload; identification of staff training needs; and possible areas for improved performance outcomes.

At the outset of the transition, a kickoff meeting will be conducted with Golden Senior Managers and the Transition Team. At this meeting, our Team will set forth its proposed transition objectives, steps, and schedules for discussion and agreement. Our Process/Operations Team then proposes to conduct detailed interviews with Golden program management personnel. As has proven effective on previous EERE contracts, these interviews can be structured to minimize

time requirements by providing specific written questions in advance to the program managers. We find this process eliminates unfounded or outdated assumptions and establishes factual baselines and communications channels on which to build project-specific relationships. Critical information sought will include:

Detailing of immediate, mid, and long term requirements and priorities;

Identifying key support skills and expertise;

Understanding Golden's preferred operating styles relative to communications, work flows, and feedback; and

Establishing clearly defined expectations and measures of success.

Information obtained from these interviews will provide our Project Manager with a clear picture of the needs and performance desires of Golden Managers. This process provides critical insight to guide our immediate and on-going project operations, and has been highly effective in ensuring a seamless continuity of operations.

It is important to stress that corporate monitoring will be an on-going function throughout the contract. Ms. Faye Fields (President, IRT) and Mr. Ronald Thomas (President, McNeil) will serve as the corporate monitors for this project. This ensures that our Project Manager has immediate and high-level access to address any unanticipated requirements that may occur at Golden. It also provides the Field Office with a large corporate infrastructure (personnel, computer, budget, facility, etc.) to immediately support project team responsiveness to Golden's pending needs. We believe this is a unique and proven commitment that our Team brings to this support project.

5.2.4 Summary Briefing

The IRT Transition Team proposes to fully brief Golden Management on the 30th day of the project. This briefing will demonstrate how all objectives were accomplished and our mutual understanding of how Golden interests can best be served beyond this initial start-up period. We are committed to supporting this project at the staff, project management, and corporate management levels throughout the life of the contract. You are our valued customer.

6.0 PAST PERFORMANCE

6.1 Introduction

Integrated Resource Technologies and its Subcontractor, McNeil Technologies, have formed an outstanding team with a demonstrated record of providing administrative and technical support services. Individually and as a team, these companies have the required skills, corporate resources, management strategies, and experience for success. We are presenting a portfolio of five corporate qualifications that demonstrates our qualifications to completely fulfill the requirements of the Statement of Work. Past performance client recommendations are provided in Appendix A.

6.2 Past Performance Summaries

Contract Administration Support
U.S. Customs Service

REDACTED
EXEMPTION 4

Total Contract Value: \$435,220

PROJECT SUMMARY

IRT personnel provide on-site assistance to the Procurement Division within the U.S. Customs Service by closing-out Federal contracts and disposing of contract files. IRT staff are well-versed in all aspects of Federal government procurement and acquisition from pre-award to post-award, in addition to being thoroughly familiar with relevant computer hardware/software applications.

SIMILARITIES TO STATEMENT OF WORK

Records Management Support

IRT performs many activities associated with records management. Some duties include: the redesign of the contract inventory filing system allowing for easier access and tracking, periodic inventory of records, providing records upon request, and the disposition of all files and classified materials in accordance with relevant schedules and requirements.

Project Monitoring and Evaluation Support

IRT provides project support by preparing and submitting quarterly reports to the Contracting Officer's Technical Representative. These quarterly reports compile data and summarize project information, provide documentation on specific actions taken, and provide recommendations for the next quarter.

Solicitation Support/Procurement Support

IRT supports solicitation and procurement activities in numerous facets. Specific procurement activities IRT supports include: completing necessary actions for price revisions, verifying settlement of subcontracts by prime contractor, performing contract audits, tracking and reviewing deliverables, ensuring that requirements have been met, and ensuring the completion of all termination documents.

Training Programs in Substance Abuse and Suicide Prevention
U.S. Marine Corps

REDACTED
EXEMPTION 4

IRT Contract Value: \$237,000 (subcontractor) to
ARTI

PROJECT SUMMARY

IRT managed all aspects of the Training Programs in Substance Abuse and Suicide Prevention project in addition to managing all activities of an out-of-state subcontractor. IRT was responsible for the design and development of courses, production of training materials, and transportation of materials to training sites throughout the United States, Japan, and England. Approximately 48 programs were conducted each year with about 25 participants per program.

SIMILARITIES TO STATEMENT OF WORK**Public Affairs Support**

IRT maintained communication between the Marine Corps and contractors and provided support to Marine Corps personnel located at Headquarters and various facilities in scheduling and implementing approximately 10 training programs per year. For each program, IRT staff designed, developed, and assembled participant manuals consisting of approximately 120 pages per manual, approximately 10 manuals per year. In addition, IRT provided logistical support to Headquarters staff, trained site personnel during programs, monitored and revised schedules, and ensured that all training materials and equipment were available when needed.

Mail, Facsimile, and Filing Support

IRT was responsible for the coordination and transportation of all training materials, often for multiple concurrent programs, to training sites located at Federal facilities.

Project Monitoring and Evaluation Support

IRT recruited and recommended qualified instructors for each program, maintained a database of approved instructors, and assigned instructors to training programs based upon their qualifications. In addition, IRT designed and collected evaluation forms from all participants at each program and used compiled data to generate summary statistics and presentations on the effectiveness of the programs and to recommend program changes and/or instructor assignments.

**Access Control and Operations Management Support,
Defense Threat Reduction Agency**

REDACTED
EXEMPTION 4

6. IRT Contract Value: \$126,761

\$126,761

PROJECT SUMMARY

IRT provides support for the continuous coverage and management of the day-to-day functions at the Defense Threat Reduction Agency (DTRA) facility. IRT personnel provide administrative support for DTRA-sponsored conferences and meetings, operate and maintain personnel computerized databases, operate and monitor personnel and visitor access, closed circuit television systems, intrusion detection alarms, and monitor and respond to emergencies.

SIMILARITIES TO STATEMENT OF WORK**Public Affairs Support**

IRT manages all meetings and conferences and maintains the associated data base, answers inquiries related to DTRA activities, assists in resolving discrepancies and problems related to meetings and conferences, and ensures registration of conference participants is accomplished in a timely manner.

Computer Operations Support

IRT reviews and updates the security data base on a regular basis, ensuring integrity. IRT also troubleshoots the card access system, maintaining a log of problems and abnormalities as well as the corrective actions taken.

Receptionist

The receptionist position at the DTRA facility is responsible for answering telephones at the Access Control Center switchboard, directing calls and taking messages, and greeting and announcing all visitors to DTRA point-of-contact personnel. This individual also maintains all activities in Daily Activities Log Report, performs hand-carried item checks, and receives, processes, and maintains a log of all incoming and outgoing visit requests.

Personnel Support

IRT receives, processes and obtains approval from a DTRA point-of-contact for all DTRA contractor visit requests to Department of Energy facilities. In addition, IRT codes, programs, documents, issues, and maintains accountability for DTRA staff badges, and coordinates all documentation for foreign visitors as required by regulations.

**Financial, Administrative, Analytical, and Technical Support
Defense Advanced Research Projects Agency**

**REDACTED
EXEMPTION 4**

6. Total Contract Value: \$1,902,979

\$1,902,979

PROJECT SUMMARY

McNeil plays an integral role in the Defense Advanced Research Projects Agency (DARPA) Information Systems Office (ISO). McNeil is responsible for office management including financial, administrative, and computer and information technology support. Some of the specific functions which McNeil has provided are summarized below.

Computer Operations Support

**REDACTED
EXEMPTION 4**

As part of this database McNeil provides data development and technical analyses with an emphasis on network optimization, easy-to-use menus, and relevant links. In addition, McNeil administers and populates the "DARPA ISO World" public Web site and developed, maintains, and populates the ISO Intranet, recommending innovative approaches for procedures such as travel vouchers and funding documentation. Further, McNeil is responsible for all aspects of network and LAN management support including evaluating and recommending hardware/software purchases, establishing security fire walls, developing procedure and guideline manuals for all computer hardware/software, and ensuring that individual workstations contain appropriate hardware/software and function properly.

Records Management Support

McNeil maintains ISO's central hard copy file system. This includes all administrative files, employee information, travel documentation, etc., as well as all funding documents relevant to ISO program fiscal activities.

Financial Support Services

McNeil provides quality control, proper documentation, and the timely reporting on the status of all ISO commitments, obligations, and expenditures. Specifically, McNeil administers and monitors prior years, current year, and future years fiscal data, maintains the ISO database containing all fiscal changes to programs resulting from budget allocations, reductions, and reprogramming actions, prepares funding commitment documents in accordance with DoD instructions and directives, and generates periodic fiscal summaries, analyses, and reports in support of ISO planning, programming, and budgeting activities.

Procurement Support

McNeil analyzes all signed contracts and ARPA funding requests/commitment documents, ensuring that the funding profile depicted in the ARPA fiscal documents matches the fiscal requirements of the signed contract.

Management and Operational Support Services
U.S. Department of Energy

REDACTED
EXEMPTION 4

6. Total Contract Value: \$2,993,103

\$2,993,103

PROJECT SUMMARY

McNeil provides support services to the Department of Energy's Office of Energy Efficiency and Renewable Energy within the Office of Management and Operations (OMO) in two broad areas: facilities management and headquarters organization support services. As such, McNeil provides technical support in the areas of security, reviewing security directives, plans, and procedures for Headquarters and DOE field offices, mail and message services, library and inventory functions, strategic planning, organizational design and analyze studies, customer survey analyses, and evaluation services.

SIMILARITIES TO STATEMENT OF WORK

Public Affairs Support

McNeil coordinates and supports all EERE on- and off-site workshops, seminars, EERE Working Groups, and outreach functions for field and regional support offices. Duties include: all logistics, facilitation, and technical and administrative support. In addition, McNeil aids in the development of informational materials by preparing briefings and major presentations.

Records Management Support

McNeil staff is responsible for all activities associated with records management within OMO. This has entailed designing and implementing a formal filing system in accordance with DOE directives, and providing clerical duties such as distributing personnel and administrative documents, reports, DOE directives and memoranda, maintaining supplies and counts of material dispatched and received, and obtaining receipt signatures when required.

McNeil also provides additional services on an "as-needed" basis. Some of these include data entry, database maintenance and report generation, processing outgoing materials, and preparing files for retention and/or disposal, in accordance with the DOE regulations and guidelines.

Mail, Facsimile, and Filing Support

McNeil is responsible for all EERE mail services. This includes sorting and distribution of incoming and outgoing mail and providing pick-up and delivery services ensuring that program offices have immediate access to the material required to perform their tasks.

McNeil has also developed Business Management and Strategic Plans, including goals, objectives, and performance metrics to ensure effective management and decision making, and has evaluated workforce skills and staffing requirements to streamline EERE services in support of GPRA mandates.

ATTACHMENT E

PAST PERFORMANCE QUESTIONNAIRE

RFP DE-AC36-99GO10429

Offeror: Integrated Resource Technologies, Inc.

Redacted
EX. 4